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Spain

Strawberries

Annual

2005

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Report Highlights:

Spanish fresh and frozen strawberry exports during calendar year (CY) 2006 will likely return to more normal levels after exceptional results during CY 2005. Future Spanish strawberry production and exports are likely to expand, due to industry efforts to re-structure and modernize. (LR8SH1).

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
 Unscheduled Report
 Madrid [SP1]
 [SP]

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Executive Summary

- We expect Spanish CY 2006 fresh strawberry exports at 217,000 Metric Tons (MT), down from estimated 230,000 MT in CY-2005, as strawberry yields return to average after exceptional CY-2005 levels; and, Spanish frozen strawberry exports to be down to 30,000 MT in CY 2006 (32,000 MT in CY-2005), as domestic consumption continues to grow.
- Spanish strawberry production will likely expand over the medium term as a result of the adoption of improved production technologies, varieties, and marketing practices. The dominant varieties currently being grown are *Reina de los valles*, the *Camarosa*, *Tudia*, *Oso grande*, *Cartuno* and *Carisma*. The bulk of production comes from greenhouses, and some hydroponics technology. The hydroponics appears poised to expand due to economic success thus far.
- According to the Spanish Cooperatives Confederation (COAG), out of total strawberry consumption, some 54 percent is used in fresh, and some 46 percent is processed. A consumer panel run by the ministry of agriculture recently reported that home consumption of fresh strawberries (some 90 percent of total consumption in fresh) declined some 22 percent during the first quarter of CY 2005.

The Spanish strawberry industry is particularly concerned with this trend, as well as importation of Moroccan strawberries. There are several initiatives sponsored by local producer organizations aimed at encouraging promotion of fresh fruit consumption.

- The sector benefits from EU fruit and vegetables Common Market Organization (CMO) regulations. Under the CMO, Producer Organizations have access to EU and autonomous regional co-financing of operational funds. The revision of the EU fruit and vegetables CMO, which has been delayed at least until the second half in CY 2006, should not affect the Spanish strawberry sector very significantly, as the sector does not benefit from direct income subsidies. Nevertheless, the review could result in a change in the amount and/or use of the operational funds.

FRESH STRAWBERRIES

PSD Table						
Country	Spain					
Commodity	Strawberries, Fresh				(HA)(MT)	
	2003 (Revised)		2004 (Estimate)		2005 (Forecast)	
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01-2004		01-2005		01-2006
Area Planted	8,000	7,600	8,000	7,700	0	7,800
Area Harvested	8,000	7,600	8,000	7,700	0	7,800
TOTAL Production	298,000	288,300	305,000	308,600	0	295,000
Imports, Fresh	8,000	7,816	8,500	6,000	0	8,000
TOTAL SUPPLY	306,000	296,116	313,500	314,600	0	303,000
Exports, Fresh	182,600	226,821	189,000	230,000	0	217,000
Domestic Fresh Market	70,400	38,000	70,000	37,000	0	36,000
For Processing	53,000	31,295	54,500	47,600	0	50,000
TOTAL UTILIZATION	306,000	296,116	313,500	314,600	0	303,000

Production

MARKET YEAR	2000	2001	2002	2003	2004	2005	2006 (F)
Area (HA)	10,700	9,100	7,800	8,100	7,600	7,700	7,800
Prod. (MT)	354,200	328,000	330,700	265,000	288,300	308,600	295,000
Average Yield (Mt/Ha)	33.1	36.0	42.4	32.7	37.9	40.1	37.8

Source: MAPYA. (F) Forecast.

Trade

General

Spain: Fresh Strawberry Imports

CY:	2000	2001	2002	2003	2004	2005	2006
EU	3,330	2,411	5,165	6,337	4,848	3,100	5,000
Non-EU	1,010	1,002	1,329	953	2,968	2,900	3,000
TOTAL	4,340	3,413	6,494	7,290	7,816	6,000	8,000

Source: Global Trade Atlas (GTA) up till CY-2004. FAS Office estimates for CY-2005 and CY-2006.

Spain: Fresh Strawberry Exports

CY:	2000	2001	2002	2003	2004	2005	2006
EU	202,641	222,340	214,895	217,465	222,752	225,000	212,000
Non-EU	4,060	2,779	1,625	2,649	4,069	5,000	5,000
TOTAL	206,701	225,119	216,520	220,114	226,821	230,000	217,000

Source: Global Trade Atlas (GTA) up till CY-2004. FAS Office estimates for CY-2005 and CY-2006.

Trade Matrices

Import Trade Matrix

Country

Spain

Commodity

Strawberries, Fresh

Time Period

Jan/Dec

Units:

Metric Tons

Imports for:

2004

2005

U.S.

U.S.

Others

Others

France	2,986	Portugal	1,300
Portugal	1,249	France	1,000
Belgium	278	Italy	500
Other EU-25	335	Other EU	300
Morocco	2,763	Morocco	2,800
Peru	120		

Total for Others

7,731

5,900

Others not Listed

85

100

Grand Total

7,816

6,000

Export Trade Matrix

Country

Spain

Commodity

Strawberries, Fresh

Time Period

Jan/Dec

Units:

Metric Tons

Exports for:

2004

2005

U.S.

U.S.

Others

Others

France	79,009	France	84,000
Germany	62,336	Germany	59,000
U.K.	21,555	U.K.	21,000
Italy	17,364	Italy	16,000
Belgium	12,425	Belgium	10,000
Portugal	8,224	Portugal	9,000
Netherlands	7,311	Netherlands	7,000
Austria	5,725	Austria	5,000
Other EU-25	8,803	Other EU-25	14,000
Switzerland	2,996	Switzerland	3,000
Total for Others	225,748		228,000
Others not Listed	1,073		2,000
Grand Total	226,821		230,000

FROZEN STRAWBERRIES

PSD Table						
Country	Spain					
Commodity	Strawberries, Frozen				(MT)	
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01- 2004		01- 2005		01- 2006
Deliv. To Processors	53,000	31,295	54,500	47,600	0	50,000
Beginning Stocks	0	0	0	0	0	0
Production	42,400	25,036	43,600	38,000	0	40,000
Imports	13,500	22,696	14,000	14,000	0	12,000
TOTAL SUPPLY	55,900	47,732	57,600	52,000	0	52,000
Exports	35,000	29,224	36,000	32,000	0	30,000
Domestic Consumption	20,900	18,508	21,600	20,000	0	22,000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	55,900	47,732	57,600	52,000	0	52,000

Production

MARKET YEAR	2000	2001	2002	2003	2004	2005	2006 (F)
Deliv. to Processors	66,500	50,000	60,000	38,000	31,295	47,600	50,000
Prod. (MT)	42,500	31,000	35,250	30,400	25,036	38,000	40,000

Source: FAS Office, based of fragmented industry information. (F) Forecast.

Trade

General

Spain: Frozen Strawberry Imports

CY:	2000	2001	2002	2003	2004	2005	2006
EU	451	441	753	439	1,160	710	1,000
Non-EU	7,257	6,910	10,517	12,577	21,536	13,290	11,000
TOTAL	7,708	7,351	11,270	13,016	22,696	14,000	12,000

Source: Global Trade Atlas (GTA) up till CY-2004. FAS Office estimates for CY-2005 and CY-2006.

Spain: Frozen Strawberry Exports

CY:	2000	2001	2002	2003	2004	2005	2006
EU	22,861	21,699	23,148	30,313	27,277	30,000	28,000
Non-EU	1,155	1,557	2,213	2,813	1,947	2,000	2,000
TOTAL	24,016	23,256	25,271	33,126	29,224	32,000	30,000

Source: Global Trade Atlas (GTA) up till CY-2004. FAS Office estimates for CY-2005 and CY-2006.

Trade Matrices

Import Trade Matrix

Country

Spain

Commodity

Strawberries, Frozen

Time Period

Jan/Dec

Units:

Metric Tons

Imports for:

2004

2005

U.S.

0 U.S.

0

Others

Others

France	553	France	200
Belgium	395	Belgium	190
Denmark	133	Poland	130
Other EU	79	Other EU-25	190
Morocco	21,280	Morocco	13,000
China	193	China	290

Total for Others 22,633

14,000

Others not Listed

63

0

Grand Total

22,696

14,000

Export Trade Matrix

Country

Spain

Commodity

Strawberries, Frozen

Time Period

Jan/Dec

Units:

Metric Tons

Exports for:

2004

2005

U.S.

U.S.

Others

Others

France	10,795	Netherlands	11,000
Netherlands	8,121	France	7,000
Germany	3,299	Germany	3,500
Austria	1,027	Italy	2,000
Italy	974	Portugal	1,500
Belgium	578	Czech Repub.	1,300
Other EU-25	2,483	Other EU-25	3,700
Switzerland	948	Kuwait	500
Kuwait	428	Switzerland	500
China	276	Saudi Arabia	300
Total for Others	28,929		31,300
Others not Listed	295		700
Grand Total	29,224		32,000